CALIFORNIA
STUDENT AID
COMMISSION

DATA
TRANSFER

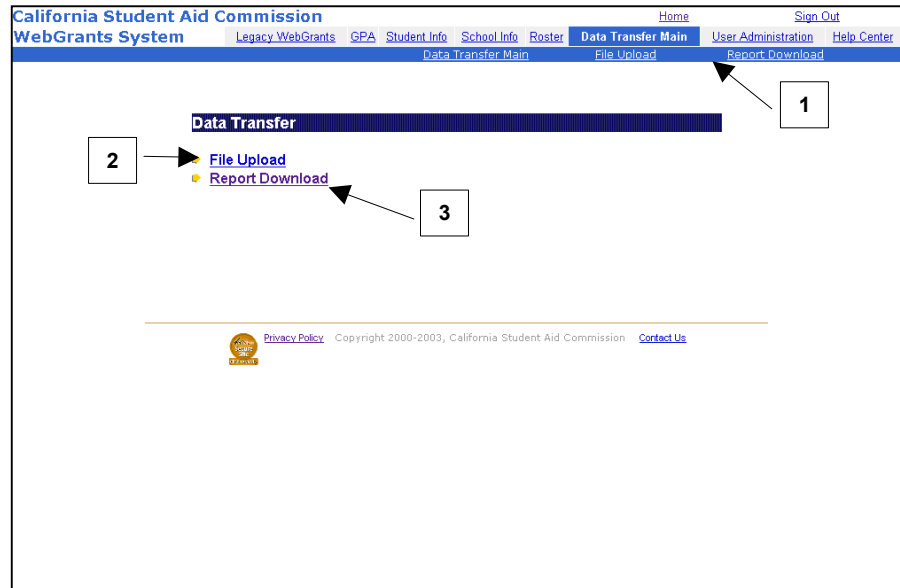## *WebGrants User Guide*

Updated: APRIL 11, 2003

DATA TRANSFER MAIN PAGE

Purpose

The Data Transfer area of WebGrants allows schools to upload files from their PC to the CSAC server as well as view and download a variety of monthly and weekly reports used for Cal Grant processing.

Page Elements

1. **Data Transfer Navigation Bar** This shortcut navigation bar contains links to all pages within the Data Transfer area of WebGrants.

2. **File Upload** Link to the File Upload Page where users can upload files from their PC to the Grant Delivery System (see page 3).

3. **Report Download** Link to the Report Download Page where users can view and download various reports (see page 5).

California Student Aid Commission   Home   Sign Out
WebGrants System   Legacy WebGrants   GPA   Student Info   School Info   Roster   **Data Transfer Main**   User Administration   Help Center
Data Transfer Main   File Upload   Report Download

Data Transfer

File Upload
Report Download

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Access

This page can be accessed by clicking on the **Data Transfer** link in the Options box on the WebGrants Home Page or by clicking on the **Data Transfer** link in the WebGrants Navigation Bar located in the upper right of all WebGrants pages.

Page Functions

Navigate to all other pages within the Data Transfer Area of WebGrants

The main page of each WebGrants area contains links to the pages included in that area. In addition, each area within WebGrants has its own submenu navigation bar that is located in the blue bar directly under the WebGrants Navigation Bar. This submenu navigation bar allows the user to move from page to page within the same area of WebGrants without continually going through the Main Page of each area.

Click the **File Upload** link to view the File Upload Page (see page 3).

OR

Click the **Report Download** link to view the Report Download Page (see page 5).

OR

Click a link on the Data Transfer navigation bar to view the indicated page.

File Upload Page

Purpose

Uploading is a simple process participating schools use to transmit specifically formatted data files containing payment and status change transactions to the Commission for batch processing. Some commonly uploaded Data Files include GPA Verifications, Grant Rosters and Community College Data Files.

Data files being prepared for transmission to the Commission must be saved prior to selection and transmitted in a text file format with a ".txt" file extension.

Page Elements

1. **Record Display Criteria Bar**
The fields on this blue bar allow users to select which types of reports to display.

   - *School ID* Users select the school to display by selecting the 8-digit school code from this drop down list. Only the schools to which the user is authorized will be displayed.

   - *Type of Upload* Users identify the type of file to be uploaded by selecting a file type from this drop down list.

   - **Award Status Extract**
   List of students for which an award status extract is requested (see page 5).

   - **C2 Enrollment Data** California Community College enrollment data for students being considered for a September 2nd Community College Cal Grant award *(Community College only).*

   - **EL Verification** Upload in response to the Education Level Verification Report sent to schools in February requesting the verification of listed students' education level as of the date the first payment was reported to the Commission. *This file upload type is not yet available.*

   - **GPA** Student grade point average verifications for either March 2nd or September 2nd Cal Grant award consideration.

   - **Grant Roster** Payment transactions updates for students listed on the school's grant roster.

2. **Academic Year** Use this field to associate a specific academic year with the file located in the File Location field directly adjacent to it.

3. **File Location Fields** file path location of the file to upload.

4. **<Browse> Button** Clicking here allows the user to search their PC or network drive for a file to upload.

5. **<Upload> Button** After entering a file to upload in at least one of the File Location Fields, this button must be clicked to upload the file.

Access

The File Upload Page can be accessed by clicking the **File Upload** link on the Data Transfer Main Page (see page 1) or by clicking the **File Upload** link on the blue submenu navigation bar.

File Record Layout Specifications

To facilitate the exchange of electronic files between the Commission and schools, standard header, detail and upload file layouts have been established for each type of file. File layout specifications for the Award Status Extract, GPA and C2 Enrollment files can be viewed by clicking on the appropriate **File Specification** link on the WebGrants Help Center page.

Page Functions

Upload a Data File to the Commission

1. Insure that the School ID field displays the school ID for which to upload a file.

2. Select the type of file to be uploaded from the Type of File drop down list. Only one type of file may be uploaded at the same time.

3. If the file path of the .txt or .xml document to upload is known, type it into the **File Location** field.

   If the file path is unknown, click the <Browse> button to locate and select the file from your PC's hard drive or a network drive (see figure 4-1). Once selected, click the <OK> button.

   ➔ The **File Location** field will automatically be populated with the file path.

4. Click the <Upload> button

   ➔ Processing time for the upload depends on the size of the file. Turning gears will appear on the page while the upload is in process.

   ➔ When the upload is complete, the message "___ number of files have been successfully uploaded" will appear.
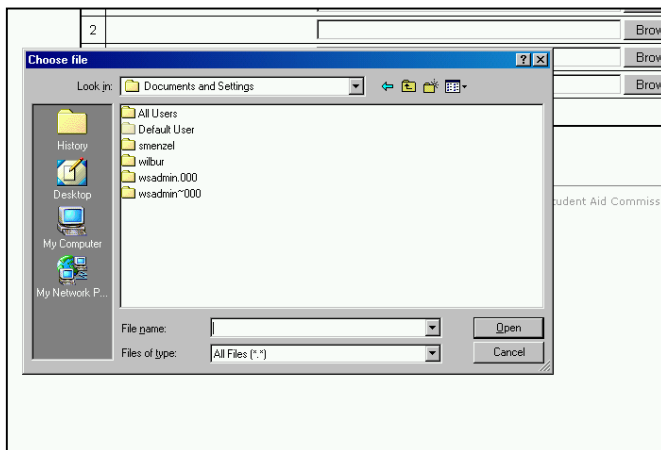

Figure 4-1: Browse pop-up window

Report Download Page

Purpose

The Report Download Page gives users access to all monthly and weekly Commission generated reports used for Cal Grant processing and reconciliation.

Page Elements

1. Record Display Criteria Bar
The fields on this blue bar allow users to select which types of reports to display.

- *School ID* Users select the school to display by selecting the 8-digit school code from this drop down list. Only the schools to which the user is authorized will be displayed.

- *Academic Year* Users select the academic year for which to display reports by selecting a year from the drop down box.

- *Report* Users select the type of report to display by selecting a report type from the drop down box. Selecting "All" will display all available types.

- **Accept/Reject** A weekly report generated to inform schools of the accepted and rejected status of that week's reported transactions on WebGrants. This report is informational only and is not to be returned to the Commission through the file upload process (see page 4).

- **Award Status Extract** A report generated when schools upload an Award Status File which requests award status information for the requested list of students. This report is available only as a Datafile. This report is informational only and is not to be returned to the Commission through the file upload process (see page 4).

- **EL Verification Report** An annual report generated in approximately February that lists new Cal Grant recipients whose initial payment has been reconciled and whose Education Level requires verification. Schools should verify the educational level of each recipient on the report and upload the results through the file upload process (see page 4). *This report type is not yet available.*

- **Grant Roster** A month report that contains the comprehensive list of Cal Grant recipients and their grant information for a particular school and a particular academic year. Changes to the grant roster can be made through the WebGrants online roster or schools can submit grant roster changes through the file upload process (see page 4).

- **Monthly Payment Activity Report**   A monthly report that provides schools with detail and summary information pertaining to the institution's term advances, accepted and reconciled payment transactions, and Cal Grant fund balances. This report is informational only and is not to be returned to the Commission through the file upload process (see page 4)

- **Other**   If the Commission runs any special system queries or reports for one or more schools, these would be located under the "Other" category of reports.

- **Unable to Determine Renewal Eligibility Report**   An annual report generated in approximately July. This report lists all Cal Grants recipients that the Commission believes were enrolled at the school for the prior year for whom at least one term has yet to be accounted for by the reporting of a payment, a leave of absence or another transaction. This report is informational only and is not to be returned to the Commission through the file upload process (see page 4).

- *Month* Users can display reports that were created during a particular month by selecting a month from this drop down box. Selecting "All" will display reports for every month in the current academic year.

- *Media Type* WebGrants reports are created in two different file types. Users can filter reports by their output type by selecting a media type from the drop down box. Selecting "All" will display all available media types.

  - *DataFile* The report data is formatted to facilitate download into an external database program.

  - *Report*   The report data is formatted to facilitate on screen viewing or printing.

2. **Report Display Table** Displays a list of reports that match the selection criteria chosen in the Search Bar.

3. **Display/Download** **Link** Click here to view and/or download the report listed on the corresponding line.

Access

The Report Download Page can be accessed by clicking the **Report Download** link on the Data Transfer Main Page (see page 1) or by clicking the **Report Download** link on the blue submenu navigation bar.

Page Functions

View a Report

1. Select the school code of the school for which to display reports from the **School ID** drop down list.

2. Select the academic year for which to display reports from the **Academic Year** drop down list.

3. To further filter the list of reports to display, select a report, month, and/or media type from the corresponding fields (this step is not required).

4. Click the <Go!> button

   ➜ The selected reports will populate the **Report Display Table**.

5. Click the **Display/Download** link on the **Report Display Table** that corresponds to the report to view.

   ➜ The selected report will be displayed in a separate pop-up window.

Download a Report

1. Select the school code of the school for which to display reports from the **School ID** drop down list.

2. Select the academic year for which to display reports from the **Academic Year** drop down list.

3. To further filter the list of reports to display, select a report, month, and media type to from the corresponding fields (this step is not required).

4. Click the <Go!> button

   ➜ The selected reports will populate the **Report Display Table**.

5. Click the **Display/Download** link on the **Report Display Table** that corresponds to the report to view *with the right mouse button*.

   ➜ A shortcut menu will appear next the mouse cursor

6. Select the "Save Target As…" option from the shortcut menu (see figure 7-1)

   ➔ The "Save As" pop-up box will appear (see figure 7-2)

7. Select a location on your PC or network drive to which the report can be saved and click the **<Save>** button.
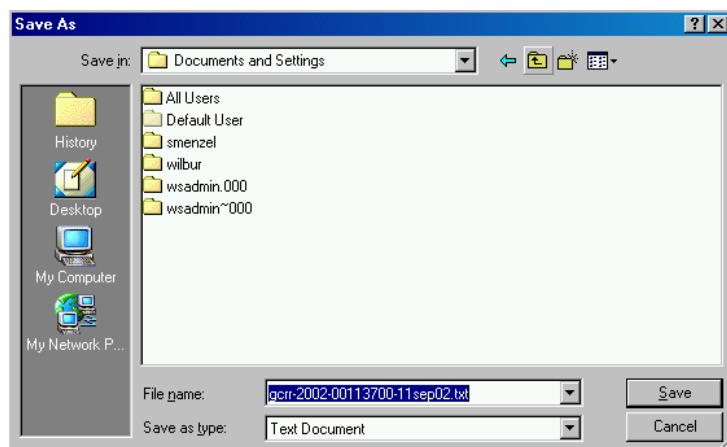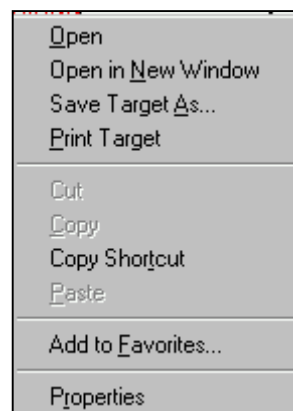

Figure 7-2: Shortcut Menu

Figure 7-1: Shortcut Menu